



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Joanna Weiss
Status: Congressional Candidate
State/District: CA47

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 08/13/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Audrey 529 ⇒ Audrey 529 [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		
Law Offices of Joanna Joyce Weiss, 100% Interest [OL] LOCATION: San Juan Capistrano, CA, US DESCRIPTION: Law practice		\$15,001 - \$50,000	None		
LPL Fund ⇒ JP Morgan Chase Bank NA [MF]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
LPL Fund ⇒ Optimum Fixed Income Fund Institutional Class [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
LPL Fund ⇒ Optimum International Fund Institutional Class [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
LPL Fund ⇒ Optimum Large Cap Growth Fund Institutional Class [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LPL Fund ⇒ Optimum Large Cap Value Fund Institutional Class [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
LPL Fund ⇒ Optimum Small-Mid Cap Growth Fund Institutional Class [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
LPL Fund ⇒ Optimum Small-Mid Cap Value Fund Institutional Class [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
LPL Fund ⇒ US Bank National Association [MF]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Music Publishing Company ⇒ This Was My College Money Publishing LLC [OL] LOCATION: San Juan Capistrano, CA, US DESCRIPTION: Music publishing		\$1,001 - \$15,000	Royalties	\$1,001 - \$2,500	\$2,501 - \$5,000
Music Publishing Company ⇒ Wells Fargo Bank Checking Account [BA] DESCRIPTION: Music Publishing Account		\$1 - \$1,000	None		
Roth IRA Jason ⇒ Vanguard Federal Money Market Fund [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Roth IRA Jason ⇒ Vanguard Total International Stock Index Fund ETF [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Sheppard Cash Balance Pension Plan ⇒ SMRH Cash Balance Pension Plan [PE]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
Sheppard Mullin, 1% Interest [OL] LOCATION: Costa Mesa, CA, US DESCRIPTION: Sheppard Mullin partnership	SP	\$250,001 - \$500,000	None		
Sheppard Retirement and Savings Plan ⇒ T ROWE PRICE RETIRE 2035 TR F [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
Traditional IRA Vanguard Jason ⇒ Vanguard Federal Money Market Fund [MF]	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA Vanguard Jason ⇒ Vanguard Total Bond Market ETF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA Vanguard Jason ⇒ Vanguard Total Bond Market Index Fund Admiral Shares [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Traditional IRA Vanguard Jason ⇒ Vanguard Total International Stock Index Fund ETF [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA Vanguard Jason ⇒ Vanguard Total International Stock Index Fund ETF [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA Vanguard Joanna ⇒ Vanguard Federal Money Market Fund [MF]		\$1 - \$1,000	Tax-Deferred		
Traditional IRA Vanguard Joanna ⇒ Vanguard Total Bond Market ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA Vanguard Joanna ⇒ Vanguard Total Bond Market Index Fund Admiral Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA Vanguard Joanna ⇒ Vanguard Total International Stock Index Fund ETF [MF]		\$100,001 - \$250,000	Tax-Deferred		
UCI retirement plan Jason ⇒ UC Domestic Small Cp Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		
UCI retirement plan Jason ⇒ UC Pathway 2035 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Walt Disney Company (DIS) [ST] DESCRIPTION: Will 1 share	DC	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Walt Disney Company (DIS) [ST] DESCRIPTION: Leah 1 share	DC	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Walt Disney Company (DIS) [ST] DESCRIPTION: Audrey 1 share	DC	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo Bank Checking Account [BA]	JT	\$50,001 - \$100,000	None		
Wells Fargo Bank Checking Account [BA] DESCRIPTION: Leah	DC	\$1 - \$1,000	None		
Wells Fargo Bank Checking Account [BA] DESCRIPTION: Will	DC	\$1 - \$1,000	None		
Wells Fargo Bank Savings Account [BA] DESCRIPTION: Will savings account	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Bank Savings Account [BA] DESCRIPTION: Leah	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Bank Savings Account [BA] DESCRIPTION: Audrey	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Sheppard Mullin	Spouse Salary	N/A	N/A
This Was My College Money Publishing LLC	Royalties	\$2,500.00	\$2,500.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	January 2020	Bank of America Revolving Line	\$10,000 - \$15,000
	American Express	January 2020	Credit card	\$50,001 - \$100,000
SP	Wells Fargo Bank	September 2015	SMRH Capital Loan Account	\$250,001 - \$500,000
JT	USAA	May 2022	Auto loan	\$15,001 - \$50,000
	GMC	October 2020	Auto loan	\$15,001 - \$50,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	USAA	August 2022	Auto loan	\$15,001 - \$50,000
SP	Ford	September 2021	Auto loan	\$15,001 - \$50,000
SP	AES	May 1996	Student loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President/Board of Director	Women for American Values and Ethics Action Fund
Owner	Law Offices of Joanna Joyce Weiss
Member	This Was My College Money Publishing LLP
President/Board of Director	Women for American Values and Ethics Political Action Committee
Member of Board of Directors	Wound Walk OC

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Audrey 529 (Owner: DC)
LOCATION: CA
- LPL Fund (Owner: JT)
LOCATION: US
- Music Publishing Company (10% Interest)
LOCATION: CA, US
- Roth IRA Jason (Owner: SP)
- Sheppard Cash Balance Pension Plan (Owner: SP)
- Sheppard Retirement and Savings Plan (Owner: SP)
- Traditional IRA Vanguard Jason (Owner: SP)
- Traditional IRA Vanguard Joanna
- UCI retirement plan Jason

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes No

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Joanna Weiss , 08/13/2023